(12) INTERNATIONAL APPLICATION PUBLISHED UNDER THE PATENT COOPERATION TREATY (PCT)

(51) International Patent Classification⁷: G06F 17/00

(21) International Application Number: PCT/US00/32062

(22) International Filing Date:
21 November 2000 (21.11.2000)

(25) Filing Language: English

(26) Publication Language: English

(30) Priority Data:
60/167,065   23 November 1999 (23.11.1999)   US
09/531,357   20 March 2000 (20.03.2000)   US

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(81) Designated States (national): AE, AG, AL, AM, AT, AU, AZ, BA, BB, BG, BR, BY, BZ, CA, CH, CN, CR, CU, CZ, DE, DK, DM, DZ, EE, ES, FI, GB, GD, GE, GH, GM, HR, HU, ID, IL, IN, IS, JP, KE, KG, KP, KR, KZ, LC, LK, LR, LS, LT, LU, LV, MA, MD, MG, MK, MN, MW, MX, MZ, NO, NZ, PL, PT, RO, RU, SD, SE, SG, SI, SK, SL, TJ, TM, TR, TT, TZ, UA, UG, UZ, VN, YU, ZA, ZW.

(84) Designated States (regional): ARIPO patent (GH, GM, KE, LS, MW, MZ, SD, SL, SZ, TZ, UG, ZW), Eurasian patent (AM, AZ, BY, KG, KZ, MD, RU, TJ, TM), European patent (AT, BE, CH, CY, DE, DK, ES, FI, FR, GB, GR, IE, IT, LU, MC, NL, PT, SE, TR), OAPI patent (BF, BJ, CF, CG, CI, CM, GA, GN, GW, ML, MR, NE, SN, TD, TG).

Published:
— Without international search report and to be republished upon receipt of that report.

For two-letter codes and other abbreviations, refer to the "Guidance Notes on Codes and Abbreviations" appearing at the beginning of each regular issue of the PCT Gazette.

(54) Title: SYSTEM AND METHOD FOR PROVIDING EXPERT REFERRAL OVER A NETWORK WITH REAL TIME INTERACTION WITH CUSTOMERS
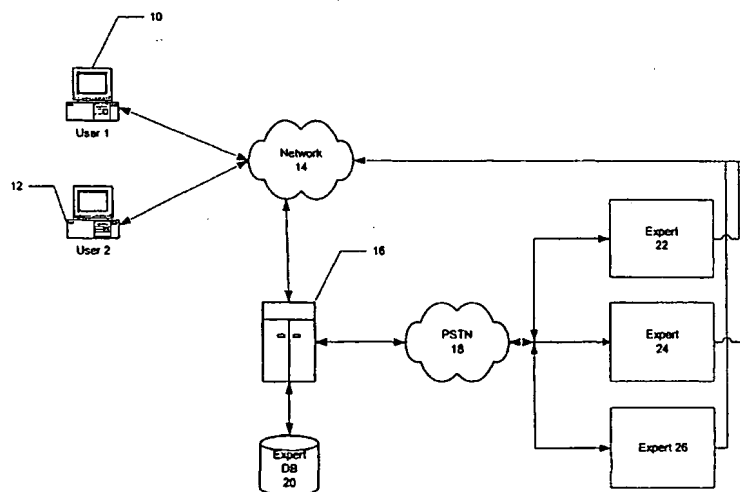
(57) Abstract: A system and method for assigning an expert to a request for assistance including real time interaction. The invention allows users to request assistance over the internet to an expert server having a file of qualified experts. The trouble "ticket" is assigned an alias and is sent out to a number of experts having the correct qualifications who then have an opportunity to respond. The first to respond is assigned an alias and communicates in real time with the requester via the expert server. Upon completion of the ticket, the expert so designates and the requester is asked to fill out a survey nothing the satisfaction with the service provided. Experts are assigned ranking and are paid and solicited for further work based upon the ranking. The system of the present invention is used in a variety of disciplines.

1   **Title of Invention:**   System and Method for Providing Expert Referral Over a

2   Network with Real Time Interaction with Customers

3

4   **Relationship to Other Applications:**

5   This application is a utility application which claims the benefit and priority of

6   Provisional Application No. 60/167,065 entitled "System and Method for Providing

7   Expert Help Over a Network" filed 11/23/99.

8   **Field of the Invention:**

9   This invention relates generally to network access to for expert referral. More

10 particularly the present invention provides a system and method for obtaining assistance

11 via network notification to experts and subsequent expert-to- customer contact.

12 **Background of the Invention:**

13   As computers and software proliferate, the need for help desk assistance becomes

14 more and more critical especially to those customers who are not technically

15 sophisticated. The difficulty is that individual customers become frustrated when they

16 must sit on a help line for many hours before they get human assistance or, equally

17 frustrating, are shunted to a frequently asked question screen, which has the answers to

18 many questions that are not helpful for the particular problem that the individual customer

19 is experiencing.

20   The present invention seeks to solve these problems by qualifying and establishing

21 a large number of experts in various hardware and software fields. For example, the

22 present invention will solicit and store qualifications for experts in Microsoft Windows,

23 Sun products, Apple products, and indeed, many other hardware and software products.

1   These experts, most of whom will be independent contractors, will be directly accessible

2   via the database of the present invention.

3   After registration with the system of the present invention and providing customer

4   contact information such as telephone number and email, when a customer needs

5   particular assistance with a particular product, the customer will access the website of the

6   present invention and state the problem being experienced. Once a query for help is

7   made, the system of the present invention sends a pager or other notification signal to an

8   appropriate expert who can handle the problem being experienced by the customer.

9   Indeed, a call may go out to multiple experts all of whom have the option to respond to the

10   particular request. Contact information is also presented to the experts in this first

11   communication.

12   Whichever expert responds first to the request, that expert will have the contact

13   information to immediately contact the customer experiencing the problem. In this

14   fashion, one of the key problem areas, that is time of responding to a problem, is

15   minimized.

16   The customer can then respond either via email through the server of the present

17   invention to the customer or via internet telephone through the server of the present

18   invention to the customer. In either case response goes through the server of the present

19   invention in order to be able to track such statistics as response time, and whether the

20   customer was satisfied or dissatisfied with the response of the particular expert.

21   In responding to the customer, several modes of communication can take place.

22   As noted above, email between the customer and the expert can occur. However, in those

23   cases where a more consistent contact is required during troubleshooting, the system

24   provides for a real time "chat" session to take place whereby an ongoing conversation via

2

1   a typical chat window is established. In the event that even more contact is required, a

2   video conferencing link may also be established by the server of the present invention to

3   allow troubleshooting to occur in a more visual fashion. Yet another route which may be

4   established is internet telephony between expert and customer. All of these methods are

5   within the scope of the present invention and are designed to solve the problem being

6   encountered by the customer quickly and efficiently

7   Once the problem is solved, the customer who experienced the problem is given

8   the option of responding to a questionnaire simply asking if the problem was solved, if the

9   expert was responsive to the question, and several other key questions that will assist the

10   system of the present invention in evaluating the performance of the expert.

11   Statistics will be kept on the performance of experts involved in the system. For

12   those experts who continually rank highly, calls for assistance will continue to go to those

13   experts on a priority basis. For those experts who are not as successful, they will fall

14   lower in the priority list and will not receive as many calls for assistance from the system.

15   The present invention is is adaptive. If an expert who is lower on the priority list

16   continues to get high grades from customers for accomplishing tasks, that expert can

17   climb in the rankings and achieve a priority ranking thereby receiving more request for

18   assistance and hence, more revenue from responding to customers needs. Conversely,

19   those experts who do not receive favorable rankings from customers will fall in the overall

20   rankings of experts and will not receive as many phone calls for assistance an hence, will

21   not receive as much revenue from the present invention.

22   All transactions, in the preferred embodiment occur via the internet, although this

23   not meant as a limitation, whether they be by email, or internet telephone. It will be

24   apparent to those skilled in the art that communication between customer and expert can

1   also occur via telephone as well. And all transactions will proceed through the server of

2   the present invention so that activities of experts and statistics on types and frequencies of

3   certain troubled calls can be monitored.

4   In summary what is created is a virtual help desk, having experts in many different

5   areas of expertise immediately and competently responding to the queries for help from

6   customers who are in need.

7   **Brief Description of the Figures:**

8   Figure 1 illustrates the architecture of the present invention.

9   Figure 2 illustrates the overall assign up, assignment, and expert response flow of

10   the present invention.

11   Figure 3 illustrates the expert enrollment and interaction with the system of the

12   present invention.

13   Figure 4 illustrates login screen for the Expert Help Network.

14   Figure 5 illustrates a screen in which the customer selects whether he needs help or

15   is an expert.

16   Figure 6 illustrates a screen consisting of a data entry sheet requesting a plurality

17   of answers pertaining to customer identification.

18   Figure 7 illustrates the customer's customer ID and password for entering the

19   Expert Help Network.

20   Figure 8 illustrates a screen which confirms the customer's Name, city, and email

21   address that is currently valid in the system.

22   Figure 9 illustrates a plurality of questions pertaining to the customer's problem.

23   Figure 10 illustrates a plurality of items of information regarding the customer's

24   ticket.

1   Figure 11 illustrates a plurality of statuses regarding the customer's ticket(s).

2   Figure 12 illustrates a plurality of criteria for experts to join the Expert Help

3   Network.

4   Figure 13 illustrates a plurality of questions and answers pertaining to experts.

5   Figure 14 illustrates a synopsis of how the network functions and the role of

6   experts.

7   Figure 15 illustrates a plurality of requests for items of information regarding

8   contact information for the expert(s).

9   Figure 16 illustrates a plurality of pull down menus regarding the expert's skills.

10   Figure 17 illustrates a request for a plurality of items of information regarding

11   experience as an expert.

12   Figure 18 illustrates a plurality of items of information regarding references for

13   experts.

14   Figure 19 illustrates the conceptual flow for assigning an alias to customer

15   problems and experts assignments.

1   **Detailed Description of the Invention**

2   Referring to Figure 1, the overall architecture of the present invention is illustrated.

3   A plurality of customers, indeed anyone connected to the internet 9or a network

4   contemplated as one to be used with the present invention, her illustrated simply as two

5   customers, customers 10 and 12, who are connected to the internet, may experience some

6   form of computer-related or other type of problem. Customers 10, 12 contact the Expert

7   Reference Server (ER Server) 16 via a network, preferably the internet 14 although this is

8   not meant as a limitation. For example other networks in addition to the internet can also

9   be used. Customers 10, 12 pose the particular question or problem being encountered

10   with their system to the ER Server 16 over the network 14.

11   Depending upon the type of problem cited, ER Server 16 reviews its database of

12   experts 20 for the individual or individuals who are capable of responding to the questions

13   from customers 10, 12. This database of experts not only has qualifications of the experts

14   but also maintains a database of their availability if, for example, an expert is on vacation

15   for a period of time or is unavailable during a period of the day. Upon determining the

16   appropriate individual(s) who can respond to the problem, ER Server 16 sends a message

17   via any means known in the art such as wired or wireless as in the case of beepers and cell

18   phones, in this case illustrated as over the public switch telephone network (PSTN) 18 to

19   the beepers of experts 22, 24, 26 with a general reference to the type of problem being

20   encountered. This notification via PSTN is for illustrative purposes only. It is anticipated

21   that the experts can also be notified via the internet and the various means, such as internet

22   paging and telephone for example, available via the internet.

23   Experts 22, 24, 26 are beeped and, preferably an alphanumeric display noting the

24   problem being posed by customers 10, 12 is displayed. At that point any one of the

1   experts **22, 24, 26** can respond to ER Server **16** that he will handle the problem being

2   posed.

3   Contact from experts **22, 24,** and **26** can occur via the public switch telephone

4   network **18** or via the network **14** to the ER Server **16.**

5   Thereafter, and assuming, for example expert **22** responded first to the query, ER

6   Server **16** allows contact between expert **22** and, for example customer **12** in the following

7   fashion:

8   Internet telephone service can be used whereby expert **22** is connected to customer

9   **12** through server **16.** In this fashion, ER Server **16** can monitor the length of the call and

10   broker the connection between expert 22 and customer 12. Alternatively, the telephone

11   number of customer 12 can be provided to expert 22. Thereafter, expert 22 can contact

12   customer 12 to solve the problem by voice communication. Where facilities exist, a

13   videoconferencing session can be arranged. In addition, the ER server 16 has rthe

14   capability to establish a real time "chat" session between the customer and the expert.

15   Finally, ER Server 16 can provide the email address of customer 12 to expert 22 thereby

16   allowing email response to the problem being posed and also allowing back and forth

17   communication over network 14. Any of these methods are deemed to be within the

18   scope of the present invention and facilitate solving the customer's problem in an effective

19   and efficient manner.

20   After the completion of the service call by the means discussed above, expert 22

21   provides notification to ER Server 16 that the call has been successfully completed.

22   Expert Server 16 logs the completion time and date of the trouble call that was requested

23   by the customer. In this way, statistics on the general length of time to respond to and

1   solve customer problems can be logged. Further, information on the individual expert can

2   also be kept in the following fashion:

3   ER Server 16 not only brokers a trouble call between customers 10, 12 and experts

4   22, 24, and 26, but also keeps track of how well the individual experts perform in their

5   assigned tasks. For example, at the completion of each trouble call, and after the expert

6   has provided notification to the ER Server that the call has been completed, the ER Server

7   provides a questionnaire to the customers 10, 12 seeking input on customer satisfaction

8   with the service being offered. At that point, customers 10, 12 have the opportunity to

9   respond to ER Server 16 regarding whether the experts 22, 24, or 26 solved the problem

10   successfully and in a timely fashion.

11   ER Server 16 collects statistics on the performance of experts 22, 24, and 26,

12   thereby monitoring the performance of these experts. If any of the experts continually

13   score poorly in the estimation of customers 10, 12, the ranking of that particular expert

14   will be established as lower than that of the experts who perform successfully on various

15   assigned tasks. This has several ramifications. If a particular expert does not perform

16   well, that expert is put low on the priority list for being contacted by ER Server 16. If the

17   expert continues to perform poorly on the tasks that are assigned, eventually the expert

18   will be eliminated from the roll of experts who can respond to service calls. Conversely,

19   if an individual expert who initially performed poorly begins to perform better on service

20   calls assigned to that expert, ER Server 16 will keep track of that improvement thereby

21   raising the priority of that expert and list of experts who will be called to respond to

22   service calls. In this fashion, expert database 20 is continually updated and quality control

23   on the experts who are contacted and assigned customer tasks can therefore be maintained.

1   In this fashion, a series of problems are solved by the system and method of the

2   present invention. First, individual customers 10, 12 no longer have to wait inordinate

3   amounts of time for response to trouble calls on their computer systems.

4   ER Server 16 establishes the mutual arrangement between customers 10 and 12

5   before any service call is made to experts 22, 24, and 26. In this fashion, experts 22, 24,

6   and 26 do not have to be concerned about how to invoice and collect fees from customers

7   10, 12.

8   Customers 10, 12 benefit from having the best experts who can solve technical

9   problems since the ER Server 16 continually updates and establishes quality control via its

10   expert database 20 over the experts who are called to respond to trouble calls in the first

11   place.

12   On a periodic basis, ER Server 16 and the business entity that surrounds that

13   server, remits to experts 22, 24, and 26 their fees for the service calls responded to on a

14   monthly or quarterly basis as desired.

15   Referring now to Figure 2 the overall assign up, assignment, and expert response

16   flow of the present invention is illustrated. A customer accesses the system of the present

17   invention 100 preferably over the Internet although this is not meant as a limitation. For

18   example, a customer may also provide information via a telephone or other means of

19   communication.

20   Confirmation of the sign-up is then sent to the customer member via electronic

21   mail 102 providing a log in ID and password. Thereafter, either immediately upon receipt

22   of the e-mail or on a subsequent occasion when services are needed the customer member

23   logs into the system 104. At this point the customer member has a number of options.

1   If the customer member is signing on initially the customer member can create or

2   change the customer membership profile 148. This profile provides information on the

3   customer members organization, the type of equipment, and any other information relating

4   to software and operating systems being run on the equipment and the network as

5   appropriate.

6   The customer member also has the option of changing the customer member's

7   password 150. If the customer member has already provided a request for assistance

8   referred to as a "ticket" a customer member can view the ticket history 152. If the ticket

9   relates to a particular problem that the customer member has asked to be solved, the

10   customer member can view the specific ticket 154 to insure that the problem has been

11   stated appropriately. Additionally the customer member is asked to fill out a survey 156

12   that relates to how well the problem was solved, was the problem solved in a timely way,

13   was the interaction with the expert satisfactory and other factors that would give rise to

14   quality assurance with respect to managing the experts who are affiliated with the system

15   of the present invention. After the survey is completed it is submitted by the customer

16   member 158 and the ticket is closed by the system. Thereafter billing for the services is

17   accomplished 159.

18   Once the customer member has an account number and a password, the customer

19   member can call in at any time whenever there is a problem requiring a consultant. In this

20   instance, a customer member logs onto the system 104 and creates a ticket 106 which

21   describes the difficulty being encountered in as much detail as possible. Once the screen

22   detailing the problem has been completed the ticket is submitted 108 by the customer

23   member. Confirmation email is sent to the customer member. The server of the present

24   invention then takes the ticket that is submitted and e-mails it 110 to the appropriate

1   expert group for response. In this instance the group may be a group of network experts, a

2   group of experts in a particular software application, and the like. It should also be noted

3   that communication with the expert groups is made by regular e-mail and wireless devices

4   to the extent that the database has the appropriate communication information. This

5   system then continually inquires to determine if any expert has responded to the ticket and

6   indicated that he or she would respond. This is referred to as "booking" the ticket 112. If

7   after a definable number of minutes the ticket is still not booked 114 the system sends e-

8   mails to another group of experts who can appropriately respond to the question being

9   posed.

10   If the ticket has been booked by an expert 112 the system determines how the

11   ticket was booked 116. If the expert responded over the Internet the Internet procedures

12   invoked 117 as will be more fully explained below.

13   If the expert responded via e-mail the experts e-mail response is received by the

14   system 118 and the system assigns the ticket to the expert who responded 120.

15   Upon assigning the ticket to the expert 120 an e-mail or other notification is sent to

16   the expert requesting that he initiate customer contact In addition, e-mail is sent to other

17   experts in the group of expert to whom e-mail was sent informing them that the ticket was

18   booked to another expert 124 although the identify of the expert to whom the ticket was

19   booked is not necessarily disclosed.

20   As further noted below, communication and record keeping of the system involves

21   assigning alias numbers to both the request for assistance and for the response by the

22   expert in order to ensure that communication flows through the server of the present

23   invention.

1   The expert then communicates with the customer member **128** and the customer member

2   interacts with the expert **126** to solve the problem disclosed in the ticket.

3   When the ticket has been closed, that is, the problem has been solved by the

4   expert, the expert so notifies the server of the present invention to close the ticket and

5   enters information that describes how the problem was resolved **130**. The server then

6   sends an e-mail message to the customer member **132** noting that the expert has closed the

7   ticket and has solved the problem. The e-mail also requests that the customer member fill

8   out a survey to note the customer members satisfaction with the problem solution, the

9   experts performance, and any other factor that affects the resolution of the ticket originally

10   submitted by the customer member.

11   The survey is a critical aspect of the present invention and is done in an automated

12   fashion to minimize the labor associated with the customer member's participation in the

13   survey. Further, the survey serves as a basis for paying experts for work accomplished or

14   not paying experts when the result has been unsatisfactory to the customer member.

15   After submission of the survey to the customer member, the system continually

16   inquiries in its own records to determine if the survey report has been filled out **134**. If the

17   survey has not been filled out after two days, a second e-mail request for the completion

18   of the survey is sent to the customer **136**. The system then again keeps track internally to

19   determine if the survey has been filled out **138**. If the survey has not been filled out after,

20   for example two days, a final e-mail request is sent to the customer member **140** to fill the

21   survey out. The system then again internally monitors whether the survey has been

22   completed **142**. If the survey has not been completed the survey is automatically filled in

23   with certain default values and the ticket status is changed to a "closed" status **144**.

24   Thereafter billing of the customer member ensues **145**.

1   When the customer member is in the process of completing the survey the

2   customer member logs in 146 and views the ticket history 152.

3   The customer member can then complete the survey as noted earlier 156 and

4   submit that survey to the system 158. Thereafter billing ensues.

5   Referring now to Figure 3 the expert enrollment and interaction with the system is

6   illustrated. An expert initially logs onto the system of the present invention and signs up

7   to become an expert 160 who can be called upon to satisfy various tickets. The system of

8   the present invention then sends an e-mail to the expert 162 confirming his registration

9   and informing him of the pending assessment of the expert qualifications, and that this

10   will take place BEFORE the expert is assigned any tickets by the system. In this way the

11   entity managing the server of the present invention ascertains the expert's qualifications

12   and areas of expertise. If the expert is not qualified in any of the areas in which the

13   system responds to customer members an e-mail is sent to the experts so notifying the

14   expert. If the expert has the requisite qualifications a confirmation e-mail is sent to the

15   expert 168 and the expert is then logged onto the system. The expert is assigned a

16   password and customer identification number for which the expert can then log in 170.

17   At any point the expert can change or alter the expert's profile 172 thereby

18   allowing the expert to more particularly respond to and be provided with information on

19   tickets.

20   When the expert logs in 170 the expert can check in and out of the system 174 and

21   change the expert's availability 176 so that the system knows when the expert will be

22   available to receive requests for ticket response.

23   The expert can also note the experts own tickets 178 that have been responded to,

24   assigned and are in progress. The expert can click on any ticket that is noted and view a

1   specific ticket **180** and determine if the ticket has been closed **182**. If the ticket is not

2   closed, it continues to be listed on those open tickets assigned to the expert **178**. If the

3   ticket is closed as far as the expert is concerned, the expert assigns a "close pending" to the

4   ticket as noted earlier in Figure 2 **130**.

5   Once the expert logs in **170** the expert can also go to a file of unassigned tickets

6   **184** and view any specific one ticket **186** and determine if the expert can respond to the

7   ticket. If the expert can respond the expert will book the ticket as noted earlier in Figure 2

8   **120**.

9   Upon entering the website, **Fig. 4**, the customer is presented with a login screen

10   which asks also whether the customer is an expert or needs help **200**. If the customer is not

11   a customer member of the service, he is presented with a screen, **Fig 5**, in which he must

12   select whether he needs help or he is an expert **202**.

13   If the customer member selects the "I need help" option **202**, the customer member

14   is presented with a screen, **Fig. 6**, which consists of a data entry sheet requesting a

15   plurality of answers pertaining to customer identification **204**. Upon completion of the

16   data entry sheet, **Fig. 6**, the customer member is presented with a screen, **Fig. 7**, which

17   furnishes the customer member with his customer member ID and password **206**.

18   In the Customer Home screen **Fig. 8**, which confirms the customer member's

19   Name, City, and email address **208** that is currently valid in the system. Upon selecting

20   "View/Create Ticket" the customer member is presented with a screen, **Fig. 9**, which asks

21   whether this is a new ticket **210** and under what category this ticket is to be considered

22   **212**. Examples of categories are MS Exchange, Windows NT, etc. Additionally, the

23   customer member is furnished with a text box in which he enters a description of his

1   current problem 214. The customer member is also presented with a button which allow

2   him to enter the ticket 216.

3   Once the ticket is entered, the customer member is presented with a screen, **Fig.**

4   **10,** which furnishes a plurality of items of information regarding the customer member's

5   ticket 218. The customer member is notified by the expert via email (although this is not

6   meant as a limitation) when he has been assigned to the trouble call 220 by the server.

7   If the customer member selects "Ticket History," 222 he is presented with a screen,

8   **Fig. 11,** which furnishes a plurality of statuses regarding his ticket(s) 224.

9   If the customer selects the "I am an expert" option 200, the customer is presented

10   with a screen, **Fig. 12,** which gives some of the criteria for experts to join the Expert Help

11   Network 226. If the customer selects the "FAQ" (frequently asked questions) button 228,

12   he is presented with a screen, **Fig. 13,** which answers a number of question pertaining to

13   experts and the Expert Help Network.

14   If the customer selects the "How it works" button 230, he is presented with a

15   screen, **Fig. 14,** which gives a synopsis of how the Expert Help Network functions and the

16   function of experts in the network.

17   If the customer selects the "Sign up" button 232, he is presented with a screen, **Fig.**

18   **15,** which furnishes a plurality of requests for items of information regarding contact

19   information for the expert 234. Upon selecting the "Next" button 236, the customer is

20   presented with a screen, **Fig. 16,** with a plurality of pull down menus regarding his skills

21   238.

22   If the customer selects the "Next" button 236, he is presented with a screen, **Fig. 17,**

23   which requests a plurality of items of information regarding his experience as an expert

1   240. If the customer selects the "Next" button 236, he is presented with a screen, **Fig. 18,**

2   which requests a plurality of items of information regarding references as well as a text

3   box for entering data pertinent to the reference 242.

4   Referring to Figure 19, the present invention performs an "aliasing"

5   function to both ensure that communication between the ultimate client and the expert

6   occurs through the server of the present invention.

7   When a ticket is open 250, the server creates an alias 252 for the ticket that is

8   open. This alias is assigned to not only the ticket, but is associated with the person or

9   entity that is having the particular problem. In this fashion, the server can always

10   determine who the point of contact is at the customer entity for billing and survey

11   purposes.

12   The ticket number with the associated alias is then made available to experts to

13   respond to. When an expert accepts the particular troubled ticket 254, the expert is

14   assigned an alias 256 which is associated with the ticket alias created 252. This expert

15   alias 256 varies from ticket to ticket so that a particular expert who accepts five different

16   tickets may in fact have five different aliases associated with the different tickets. All

17   communication with respect to the problem occurs via the server which then associates the

18   various ticket and expert aliases and ensures that communication reaches the ultimate

19   customer from the expert.

20   When the ticket is closed 258, the various aliases are cleared 260 and these aliases

21   are subsequently made available for further tickets and aliases. Thus, the unique alias for

22   the ticket and for the expert accepting the ticket occur only so long as the ticket is opened.

23   Once the ticket is closed, the alias numbers are made available again for re-use.

1   The system and method of the present invention can also be used in a general way

2   to dispatch experts in a variety of other service areas. For example, people may have

3   difficulty with electrical systems, plumbing, stereo systems, and a wide variety of other

4   household tasks where the customer member can simply benefit from someone "talking"

5   them through the problem. Thus the application of this expert reference system of the

6   present invention is not meant as a limitation but is illustrative of the concept of having a

7   wide variety of unaffiliated experts who can respond via an expert reference server to the

8   problems of customer members in a variety of categories.

9   As a further example, and without limitation, many businesses have human

10   resources (HR) issues that require expert assistance but cannot afford to have an HR

11   person present on staff. The systems and method of the present invention will allow HR

12   experts to be on call to respond to questions in precisely the same manner as in the

13   information technology example noted above. Other such examples of the use of the

14   present invention are for legal service, technical experts within a large company being

15   referred to others within the same company, getting the most qualified plumbing expert

16   for the job and other similar choices where expertise is required.

17   It will therefore be apparent to those skilled in the art that other variations of the

18   present invention in contacting experts via wired and wireless networks and in contacting

19   customer members by the experts using both wired and wireless means can be achieved

20   without departing from the scope of the invention as disclosed.

1   I claim:

2   1.   A system for obtaining expert referral comprising:

3   a server further comprising a file of experts having qualifications;

4   a network connected to the server for allowing access to the file of experts;

5   at least one user computer connected to the network for submitting a request for

6   assistance ticket from a user and for accessing the file of experts in the server;

7   the server further comprising assignment instructions for assigning the request for

8   assistance ticket to at least one expert for response and for receiving a response

9   from the at least one expert to the assignment; and

10   the server further comprising real time communication instructions for facilitating

11   the real time communication between the expert and the user regarding the request

12   for assistance ticket.

13   2.   The system for obtaining expert referral of claim 1 wherein the server further

14   comprises instructions for registering and qualifying experts to be resident on

15   the file of experts.

16   3.   The system for obtaining expert referral of claim 2 wherein the assignment

17   instructions further comprise contact information for contacting a the plurality

18   of experts based upon expert qualifications.

19   4.   The system for obtaining expert referral of claim 1 wherein the server further

20   comprises instructions for sending a satisfaction questionnaire to the user upon

21   completion of the request for assistance ticket by the expert to whom the

22   request for assistance ticket was assigned.

23   5.   The system for obtaining expert referral of claim 4 wherein the server further

24   comprises instructions for creating a quality ranking for the expert to whom the

1   request for assistance ticket was assigned.

2   6.   The system for obtaining expert referral of claim 5 wherein the server further

3   comprises instructions for paying to expert based upon the quality ranking

4   from the user.

5   7.   The system for obtaining expert referral of claim 5 wherein the server further

6   comprises instructions for rank ordering experts based upon quality ranking

7   and assigning subsequent requests for assistance based upon quality rankings.

8   8.   The system for obtaining expert referral of claim 1 wherein the server further

9   comprises instructions for assigning an alias to the request for assistance from

10   a user and for assigning an alias to the expert who responds to the request for

11   assistance.

12   9.   The system for obtaining expert referral of claim 8 wherein communication

13   between the expert and the user occurs through the server and wherein the

14   server comprises a file of assigned aliases for routing messages between the

15   exert assigned to the request for assistance the user making the request for

16   assistance.

17   10. The system for obtaining expert referral of claim 2 wherein the instructions for

18   registering and qualifying experts further comprises recording the availability

19   of experts to respond to requests for assistance and the areas of expertise of the

20   expert.

21   11. The system for obtaining expert referral of claim 1 wherein the server further

22   comprises instructions for allowing a user to view the a status of tickets for the
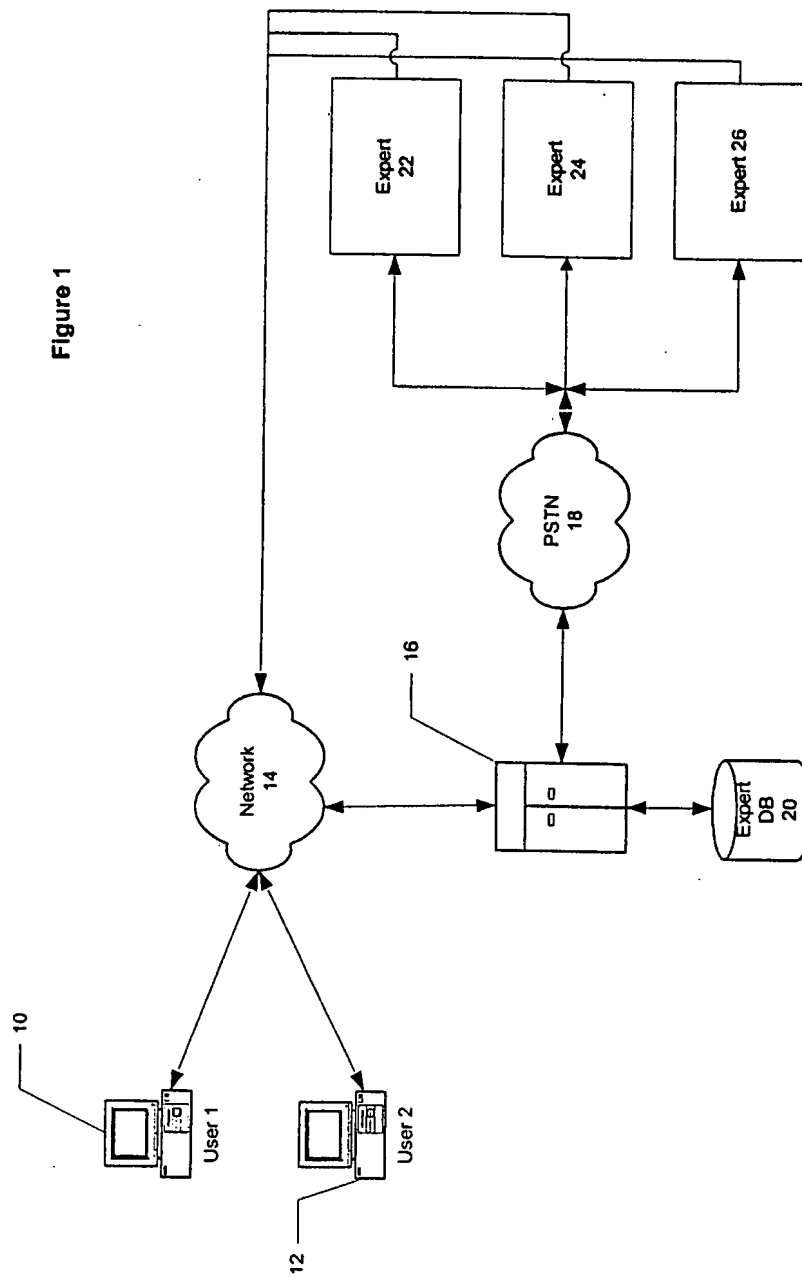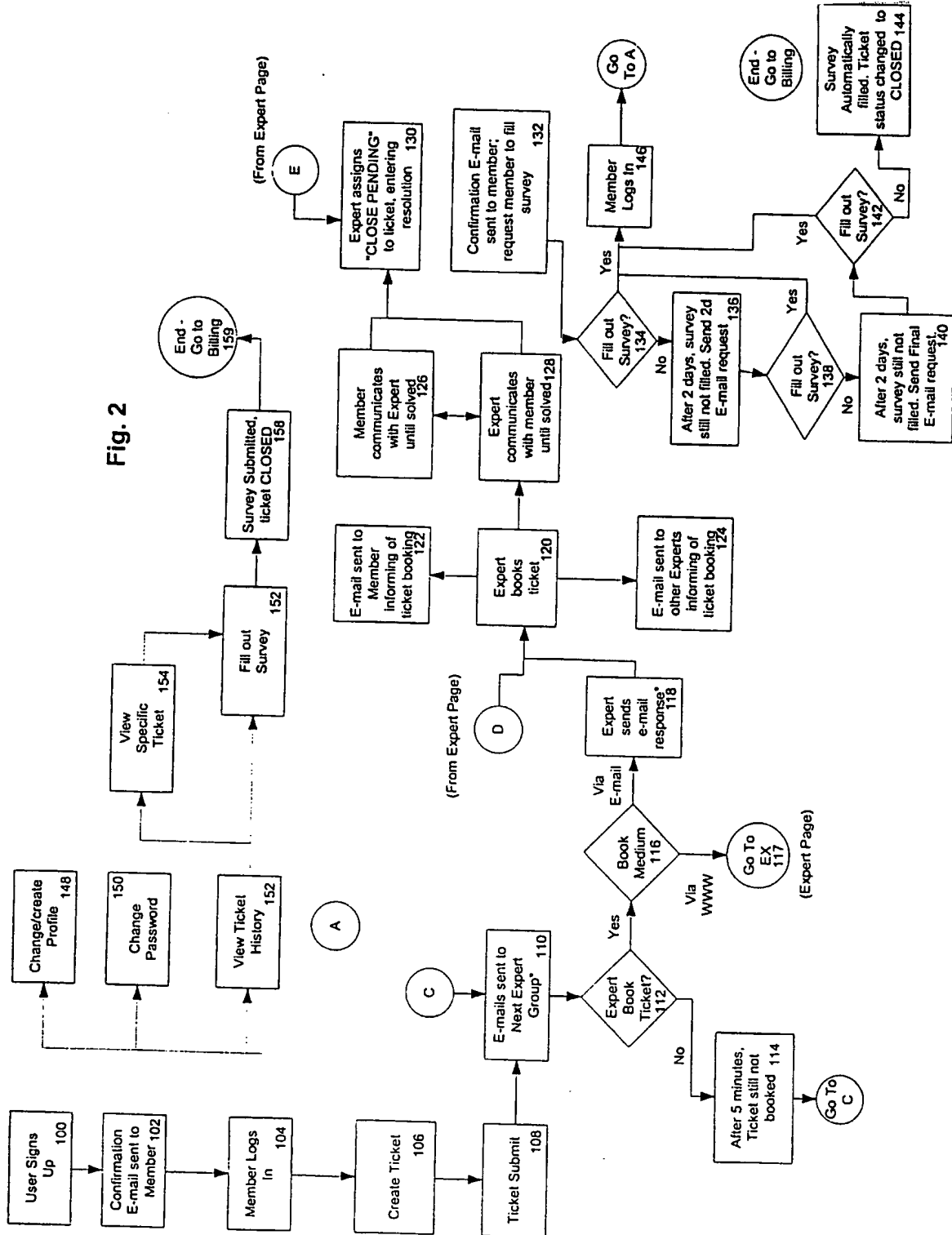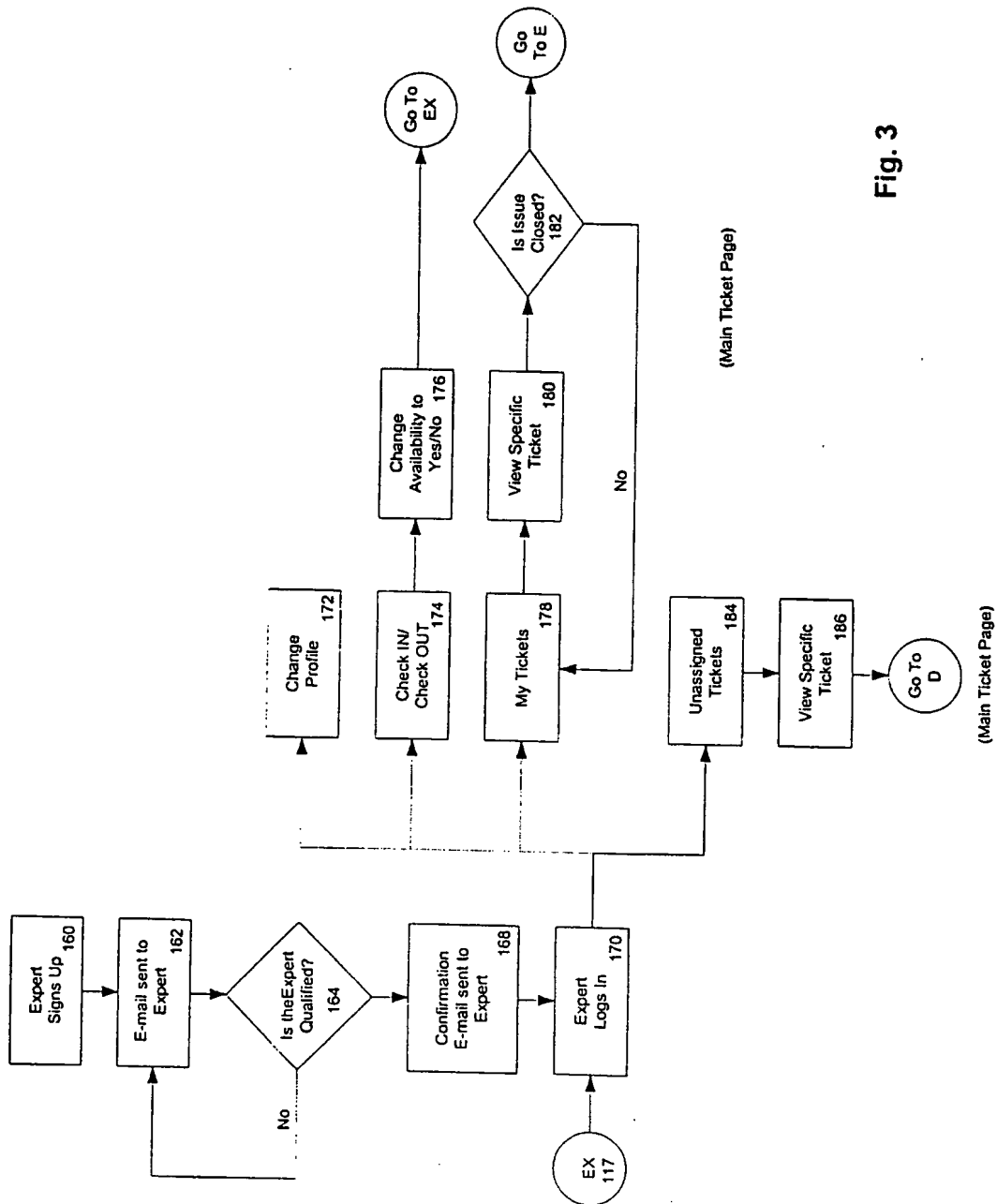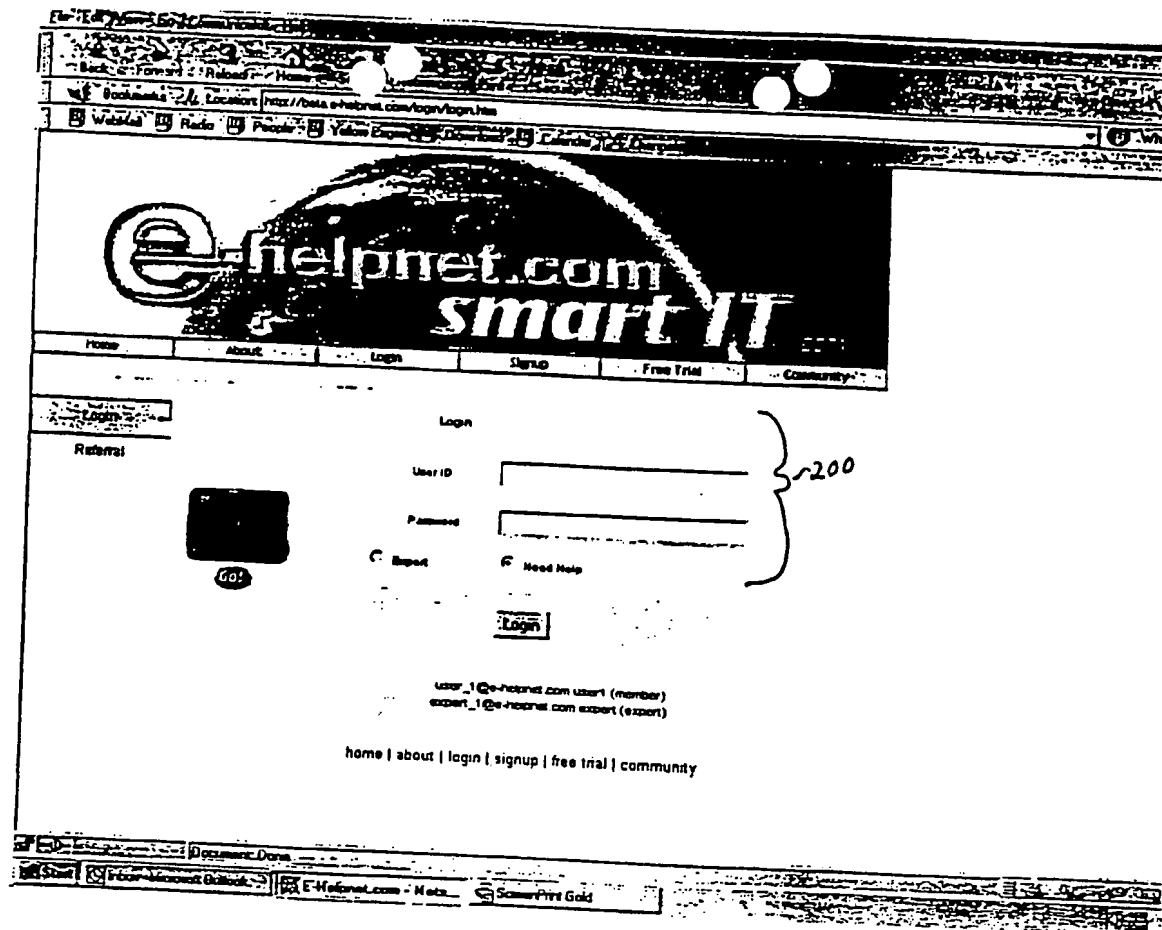
23   user.

24

12. A method for expert referral comprising:

a user requesting assistance over a first network;

a server receiving the request for assistance and creating a ticket associated with the request;

the server communicating the ticket to a plurality of qualified experts over a second network;

at least one expert responding to the ticket; and

the server facilitating real time communication between the expert and the user to solve the ticket.

13. The method for expert referral of claim 12 wherein the plurality of experts is created by registering experts and verifying their qualifications before communicating the ticket to any one expert.

14. The method for expert referral according to claim 12 wherein the first network is the internet and the second network is the internet.

15. The method for expert referral according to claim 12 wherein the first network is the internet and the second network is a PSTN.

16. The method for expert referral according to claim 12 wherein the first network is the Internet and the second network is a wireless network.

17. The method for expert referral according to claim 12 wherein the facilitating of communication comprises the server assigning an alias to the user and an alias to the expert; and passing communication between the expert and the user through the server by associating the user alias and the expert alias.

18. The method for expert referral according to claim 12 further comprising the expert closing the ticket with the server upon completion of the ticket by the

1   expert and the server submitting a satisfaction survey to the user upon the

2   completion of the ticket by the expert.

3   19. The method for expert referral according to claim 18 further comprising paying

4   the experts based upon the satisfaction survey.

5   20. The method for expert referral according to claim 18 further comprising

6   creating a ranking of the expert based upon the satisfaction survey.

7   21. The method for expert referral according to claim 20 further comprising

8   assigning subsequent tickets to the expert based upon the expert ranking.

9   22. The method for expert referral according to claim 17 further comprising the

10   server clearing the aliases upon completion of the ticket.

11 23. The method for expert referral according to claim 12 wherein the server

12   facilitating communication between the expert and the user comprises the

13   server establishing communication via video teleconferencing.

14 24. The method for expert referral according to claim 12 wherein the server

15   facilitating communication between the expert and the user comprises the

16   server establishing communication via internet telephony.

17 25. The method for expert referral according to claim 12 wherein the server

18   facilitating communication between the expert and the user comprises the

19   server establishing communication via online chat session.

20 26. The system for obtaining expert referral of claim 1 wherein the real time

21   communication instructions further comprise instruction for establishing on-

22   line chat between the expert and the user.

23 27. The system for obtaining expert referral of claim 1 wherein the real time

24   communication instructions further comprise instruction for establishing

21

1   internet telephony between the expert and the user.

2   28.   The system for obtaining expert referral of claim 1 wherein the real time

3   communication instructions further comprise instruction for establishing video

4   teleconferencing between the expert and the user.

5   29.   A system for obtaining expert referral comprising:

6   a server further comprising a file of experts having qualifications;

7   a network connected to the server for allowing access to the file of experts;

8   at least one user computer connected to the network for submitting a request for

9   assistance ticket from a user and for accessing the file of experts in the server;

10   the server further comprising assignment instructions for assigning the request for

11   assistance ticket to at least one expert for response and for receiving a response

12   from the at least one expert to the assignment; and

13   the server further comprising communication instructions for facilitating the

14   communication between the expert and the user regarding the request for

15   assistance ticket.

16   30.   The system for obtaining expert referral of claim 29 wherein the server further

17   comprises instructions for registering and qualifying experts to be resident on

18   the file of experts.

19   31.   The system for obtaining expert referral of claim 30 wherein the assignment

20   instructions further comprise contact information for contacting a the plurality

21   of experts based upon expert qualifications.

22   32.   The system for obtaining expert referral of claim 29 wherein the server further

23   comprises instructions for sending a satisfaction questionnaire to the user upon

24   completion of the request for assistance ticket by the expert to whom the

1   request for assistance ticket was assigned.

2   33.   The system for obtaining expert referral of claim 32 wherein the server further

3   comprises instructions for creating a quality ranking for the expert to whom the

4   request for assistance ticket was assigned.

5   34.   The system for obtaining expert referral of claim 33 wherein the server further

6   comprises instructions for paying to expert based upon the quality ranking

7   from the user.

8   35.   The system for obtaining expert referral of claim 33 wherein the server further

9   comprises instructions for rank ordering experts based upon quality ranking

10   and assigning subsequent requests for assistance based upon quality rankings.

11   36.   The system for obtaining expert referral of claim 29 wherein the server further

12   comprises instructions for assigning an alias to the request for assistance from

13   a user and for assigning an alias to the expert who responds to the request for

14   assistance.

15   37.   The system for obtaining expert referral of claim 36 wherein communication

16   between the expert and the user occurs through the server and wherein the

17   server comprises a file of assigned aliases for routing messages between the

18   exert assigned to the request for assistance the user making the request for

19   assistance.

20   38.   The system for obtaining expert referral of claim 30 wherein the instructions

21   for registering and qualifying experts further comprises recording the

22   availability of experts to respond to requests for assistance and the areas of

23   expertise of the expert.

24   39.   The system for obtaining expert referral of claim 29 wherein the server further

1   comprises instructions for allowing a user to view the status of tickets for the

2   user.

3

4

Figure 1

Fig. 2

Fig. 3

Go To
EX

Go
To E

Is Issue
Closed?
182

Change
Availability to
Yes/No 176

View Specific
Ticket 180

No

(Main Ticket Page)

Change
Profile 172

Check IN/
Check OUT 174

My Tickets 178

Unassigned
Tickets 184

View Specific
Ticket 186

Go To
D

(Main Ticket Page)

Expert
Signs Up 160

E-mail sent to
Expert 162

Is theExpert
Qualified?
164

Confirmation
E-mail sent to
Expert 168

Expert
Logs In 170

No

EX
117

Fig. 4

202

home | about | login | signup | free trial | community

Fig. 5

Fig. 6

Welcome to E-Helpnet.com

Member John Abolifner added. You can start using our services by logging in and using your credentials

user ID: _____ — 206
password: _____

home | about | login | signup | free trial | community

Fig. 7

Fig. 8

Fig. 9

Fig. 10

Fig. 11

Fig. 12

Fig. 13

Fig 13a

Fig 136

Fig. 14

Fig. 15

Fig. 16

Fig. 17

Fig. 18

Fig. 19

TICKET ACCEPTED 254

LOOKUP OF NEXT AVAILABLE EXPERT ALIAS AND ASSIGNED TO EXPERT 256

C

TICKET CLOSED 258

ALIASES CLEARED FOR MEMBER AND EXPERT AND CAN BE REUSED IN SUBSEQUENT CALLS 260

TICKET OPENED 250

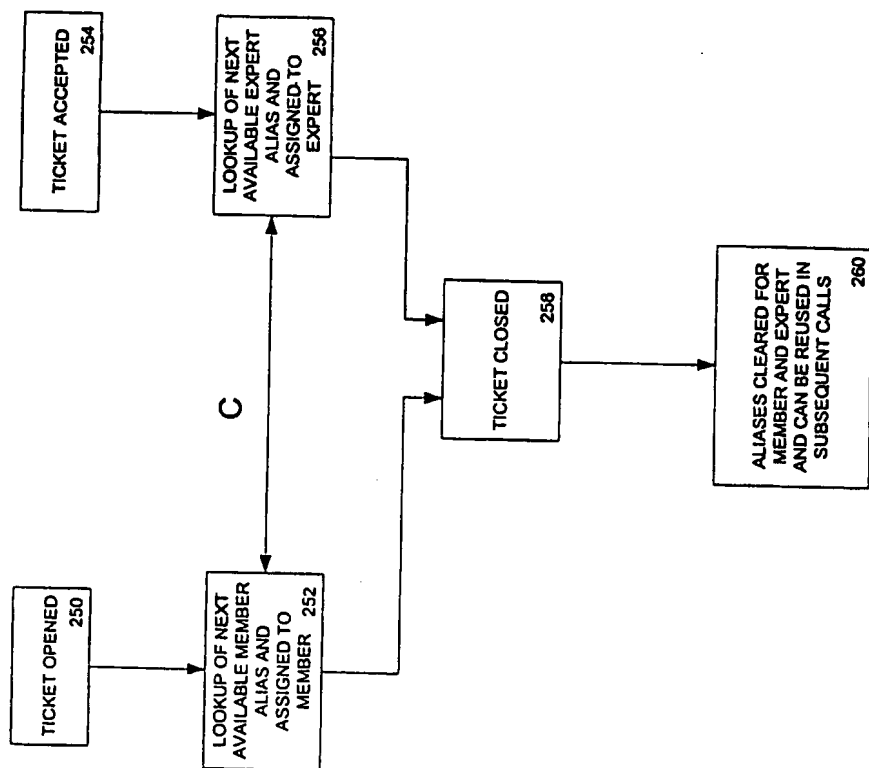LOOKUP OF NEXT AVAILABLE MEMBER ALIAS AND ASSIGNED TO MEMBER 252

C: Communication between Expert and Customer or other Expert